**Fermilab**

FermiWorks
Set Up Delegation
03.12.2015

Overview: After determining who will be the delegate(s) to manage your FermiWorks Inbox, you can set those delegations in the system. Verify the delegate(s) have the sufficient security level to perform these Actions. An email will be sent to your delegate(s), with a notification of the delegation. Before submitting the Action to the next level, ask your delegate(s) to enter a comment naming the delegator.

1.   Open the Inbox.
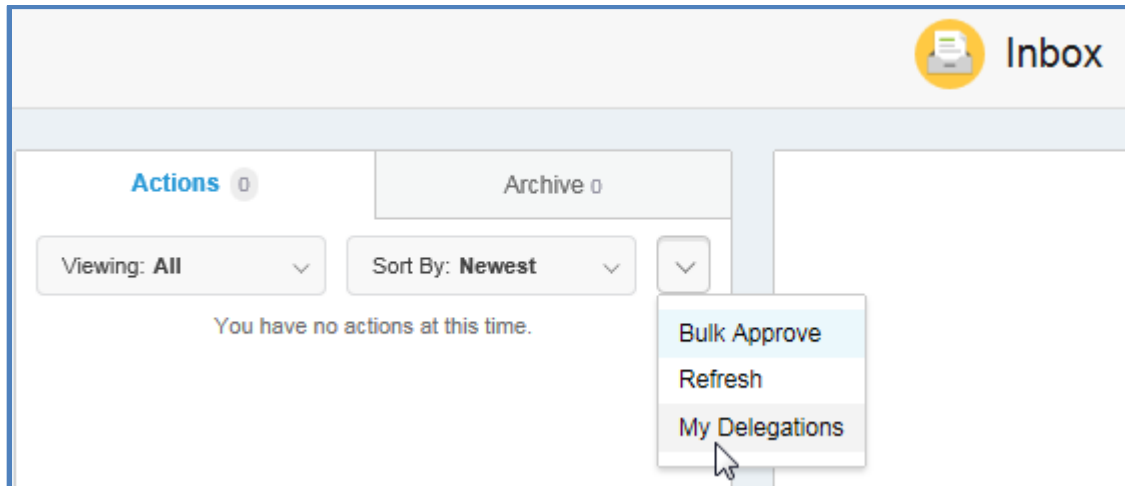
2.   Click the Gear on the Actions tab and select **My Delegations**.

3.   Click **Manage Delegations**.

4.   Enter a **Begin Date**.

5.   Enter an **End Date**.

6.   **Delegate:** Click Prompt and select the **Delegate's** Name from the Peer or Superior's list. Or type the delegate(s) name in the field.

> **NOTE:** Always select a Peer or Superior to delegate your business processes to. A subordinate may not have the same security level to be able to approve processes to move them to the next level of approval.

7.   **Start on My Behalf:** If the selected delegate(s) will be responsible for specific processes, select the FermiWorks business process(es) to **Start on My Behalf**.

8.   Scroll to the right to see the 'Do Inbox Tasks On My Behalf' field.

9.   If the delegate(s) will manage all processes, click the **For all Business Processes** radio button.

10. If the delegate(s) will manage specific processes, click the **For Business Process** radio button.

11. Select the business process the delegate(s) will manage.

> **NOTE:** Additional business processes will be added to this list on an ongoing basis.

12. Select the **None of the above** radio button if the delegate(s) will not be managing any business processes.

13. Check the Retain Access to Delegated Tasks in Inbox check box if you will be checking your FermiWorks Inbox.

14. Enter a **Comment** to remind the Delegate to enter a comment to note s/he is acting on your behalf. For example, "Approved as delegate of *delegate's name*."

15. Click **Submit**.

The delegate(s) will receive an email to notify them of Actions they are responsible to manage.